

STEP 3: IDENTIFY AND SECURE RESOURCES

Identifying and securing resources for community health planning is a constant challenge. Having a dedicated resource helps facilitate a successful planning initiative. A helpful strategy is to identify how the goals of the plan may be aligned with the goals of potential resource contributors. In addition, a detailed budget for planning activities facilitates securing both public and private resources. The budget should cover all aspects of the development process, including resources needed to carry out each of the various steps in making an assessment and developing an improvement plan.

TIPS

#1: Ask the right questions early.

- What is the scope of the community health planning process?
- What does the community want to accomplish through this process?
- Why should taxpayers or others fund the development of the plan?
- What will it take to support the planning initiative?

#2: Recognize up front that planning takes money.

- Find examples of what other community initiatives have included and required in funding.
- Develop a plan for supporting the process, identifying both people and dollars.
- Think about developing a separate budget for plan development.
- Be realistic — do not underestimate your costs.

#3: Capitalize on what you have.

- Investigate the uses of available resources.
- Negotiate reallocation of existing agency staff.
- Identify and secure assistance from experts (e.g., grant writers).
- Identify other community-based assessments recently completed that could be integrated into the community health plan.

#4: You can't get it if you don't ask for it

- Research potential external funding sources, such as the federal government, private and community foundations, and other public or private sources whose purposes may be aligned with the plan.
- Ask businesses or community groups to donate services or other non-financial resources.

#5: Don't forget to plan for the future—it's not over when the plan is released

- Identify resource needs to carry out a five-year plan including monitoring progress, publishing periodic reviews, and sustaining activities.
- Keep a wish list ready for future funding (e.g., resources for a business companion document, a special health disparities consortium, or other ideas generated during the planning).

#6: Feel free to ask for contributions.

- Partners may be willing to provide support for meetings, staff, and equipment.
- Other kinds of non-financial support include meeting facilitation, meeting space, advertising, web links, expertise in research or data analysis, writing and creating documents, and other promotional activities.

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Action Checklist:

- ☐ Identify resources needed to develop the plan.
- ☐ Identify existing internal resources.
- ☐ Develop a budget.
- ☐ Identify potential external resources, including potential donated resources.
- ☐ Plan to integrate the plan into budgeting and programming processes.
- ☐ Develop a staff and technical support plan.
- ☐ Secure identified resources and develop alternative resources, if necessary.

Notes:

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REVIEW PAST ASSESSMENT AND PLANNING EFFORTS

The following worksheet is taken from a literature review of challenges and factors for the success of an assessment and planning process. This list can be used to begin a discussion of past assessment and planning efforts and provide a starting point for building on achievements and anticipating barriers to action.

Factors Affecting Successful Assessment and Planning Efforts

- ✓ Partner collaboration and lack of turf issues
- ✓ The community as a partner
- ✓ Shared decision making
- ✓ Dedicated staff and staffing
- ✓ Commitment to assessment
- ✓ Leadership and vision
- ✓ Interagency cooperation
- ✓ Technical assistance and consultation
- ✓ A history of success in community problem solving
- ✓ Social marketing
- ✓ Limited resources and expertise for data collection and interpretation
- ✓ Too much data
- ✓ Access to data, technology, peer learning
- ✓ Marketing
- ✓ Use of quantitative and qualitative data
- ✓ Finding creative ways to pay for the process
- ✓ Capitalizing on existing community assessments